CHRONOLOGY CHART: OVERVIEW OF LIFE EVENTS SINCE 1997

Please use the chart below to tell us about your major life events since 1997. Please try to remember all the important events. In the left-hand column, there are six kinds of events plus an "other" category. It is not necessary to fill in information for each type of event for every year, but instead use the types of events and the dates listed across the top to help you remember all your important life events and about when they took place. When you are done writing down events, go over each year and rate first how stressful that year was from 1 (not at all) to 5 (extremely) and then how happy you felt that year from 1 (not at all) to 5 (extremely).

Events	1997	1998	1999	2000	2001
Births & Deaths					
Relationships & Family					
Work, Retirement, & Finances					
Health					
Travel & Moves					
Interests, Activities, & Achievements					
Other					
How stressful? (1-5)					
How happy? (1-5)					

Events	2002	2003	2004	2005	2006	2007
Births & Deaths						
Relationships & Family						
Work, Retirement, & Finances						
Health						
Travel & Moves						
Interests, Activities, & Achievements						
Other						
How stressful? (1-5)						
How happy? (1-5)						

THE STORY OF MY LATE MIDDLE AGE

A person's life can be regarded as a story, and we are interested in the way your story has developed from about age 60 to the present. Some of the events you mentioned in your overview of the period from 1997 to 2007 may be important in organizing this story, but others may not be, and something critical for your late middle age may have happened before age 60. Your story may involve changes in work, relationships, health, and other areas of life. Changes in these areas may have come unexpectedly, or you may have anticipated or planned for them. You may have had dilemmas or periods of low morale. Perhaps you have resolved these conflicts (if so, how?) or perhaps not. Perhaps you see little change, or different kinds of change in different areas of life, so that there is no single story line. Whatever is the case, please tell us how the most important events of your late middle age came about and how they affected the way you think about yourself and how you live your life. Don't be too brief!

Continue on the back of this sheet and use additional pages if you need them.

Below is some basic information that we need to have from everyone now for planning the follow-up.

Is this time of your life ___first-rate, ___good, ___fair, ___ not so good?

How would you rate your general state of health?

___Poor, ___Below average, ___Average, ___Above average, ___Excellent

Are you presently ___single, ___ widowed, ___in a stable couple relationship, ___ married?

If you are married or in a couple relationship:

How satisfied are you in it? (very dissatisfied) 1 2 3 4 5 (very satisfied)

What is the age of your partner? _____

At present, do you work for pay (check one):

____ full-time; ____ part-time; ____ very little or not at all

During most of the time from about age 40 to 60, did you work for pay (check one):

____ full-time; ____ part-time; ____ very little or not at all

Do you receive a Social Security check? ____ yes, ____ not yet, ____ not eligible

If yes, what year did you first start receiving them?_____

If not yet, what year do you anticipate beginning to receive them? _____

In thinking about your retirement status, which one of the following describes you best:

____ Retired (in what year? _____)
____ Partially-retired (since what year? _____)
____ Not yet retired (what year planning to retire? _____)
____ Hope never to retire
____ The concept of retirement does not apply to me.

Please tell us anything we need to know to understand your current work and retirement status and past work history.

If you have already retired, how do you feel about your retirement?

(very dissatisfied) 1 2 3 4 5 (very satisfied)

If you have <u>not</u> already retired, how do you <u>expect</u> to feel about it?

(very dissatisfied) 1 2 3 4 5 (very satisfied)

Please rate your satisfaction with each of the following life aspects from <u>0 (worst possible) to 10 (best possible)</u>. Then indicate the personal importance of each of the following in the right column from <u>0 (not at all important) to 10 (very important).</u> If an item does not apply to you, put NA.

Satisfaction		Importance
	My health	
	Health of others	
	My financial situation or resources	
	My current work situation overall (paid or unpaid, at work or at home)	
	My marriage or intimate relationship	
	The sexual aspect of my life	
	My looks, physical appearance	
	My friendships	
	My relationship with my children	
	What I've accomplished	
	What I'm like as a person	
	My interests, activities	
	The state of the world (e.g., environment, globalization)	
	The way things are going in the United States at this time	
	My contribution to the welfare and well-being of others	
	My spiritual life	
	My life overall	XX

How much do you feel loved and appreciated?	very little 1	2	3	4	very much 5
Do you feel the pressures in your life are...	too little 1	2	about right 3	4	too great? 5

How do you feel about turning 70? Tell us how you would label this period of life in the 60s and 70s, and give us your suggestions for the next phases of our follow-up.